



Credit: Swiss National Science Foundation

Sustentabilidad y innovación en scholarly communication

Kathleen Shearer y Eloy Rodrigues
Confederation of Open Access Repositories

Quiene somos?



- Creada en 2009
- Una asociación internacional
- > 120 miembros y asociados en 35 países de todos los continentes
- 13 de América Latina

Who is COAR?

- Over 100 members and partners from 35 countries in 5 continents
- Universities, libraries, government agencies, open access organizations, not-for-profit organizations, and platform developers
- Diverse perspectives that share a common vision

Major Activities

International voice
Raising the visibility of repository networks as key infrastructure for open science

Alignment and interoperability
Building a global knowledge commons through harmonization of standards and practices

Cultivating relationships
Supporting an international community of practice for repositories and open access

Building capacity
Advancing skills and competencies for repository and research data management

Adopting value-added services
Promoting the use of web-friendly technologies and new functionalities for repositories

Contacts Us

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Twitter: @COAR_eV

How to participate?

- Organizations can join COAR for €500 Euros per year (about \$600 US)
- Join as a single, consortial, or special member or partner
- Download the membership application (<https://www.coar-repositories.org/about/join/become-a-member>)



Executive Board

- Eloy Rodrigues, University of Minho, Portugal (Chairman)
- Carmen-Gloria Labbé, RedCLARA, Chile
- Márta Virágos, Debrecen, Hungary
- Wolfram Horstmann, University of Göttingen, Germany
- Oya Rieger, arXiv y Cornell University, United States
- Daisy Selematsela, National Research Foundation, South Africa

El sistema internacional
de las publicaciones
está
defectuoso!



El problema del acceso

TABLE 1: AVERAGE 2015 PRICE FOR SCIENTIFIC DISCIPLINES

DISCIPLINE	AVERAGE PRICE PER TITLE	DISCIPLINE	AVERAGE PRICE PER TITLE
Chemistry	\$4,871	Zoology	\$2,073
Physics	4,341	Technology	2,058
Engineering	3,039	Math & Computer Science	1,866
Biology	2,977	Health Sciences	1,694
Astronomy	2,730	General Science	1,643
Food Science	2,496	Agriculture	1,589
Botany	2,277	Geography	1,571
Geology	2,195		
SOURCE: LJ PERIODICALS PRICE SURVEY 2015			

Bid deals lock-ins

Global results of the analysis

	Out of 50,000 journals
Used journals	16,816
Cited journals	9,075
Journals mentioned by our community in the survey	8,060
subtotal	26,843 unique titles used/cited/mentioned
«essential titles» (80%)	4,852
Additional titles (from validation by departments)	1,041
subtotal	5,893 unique essential titles
2,940 titles with quantitative approach	2,953 titles from community consultation

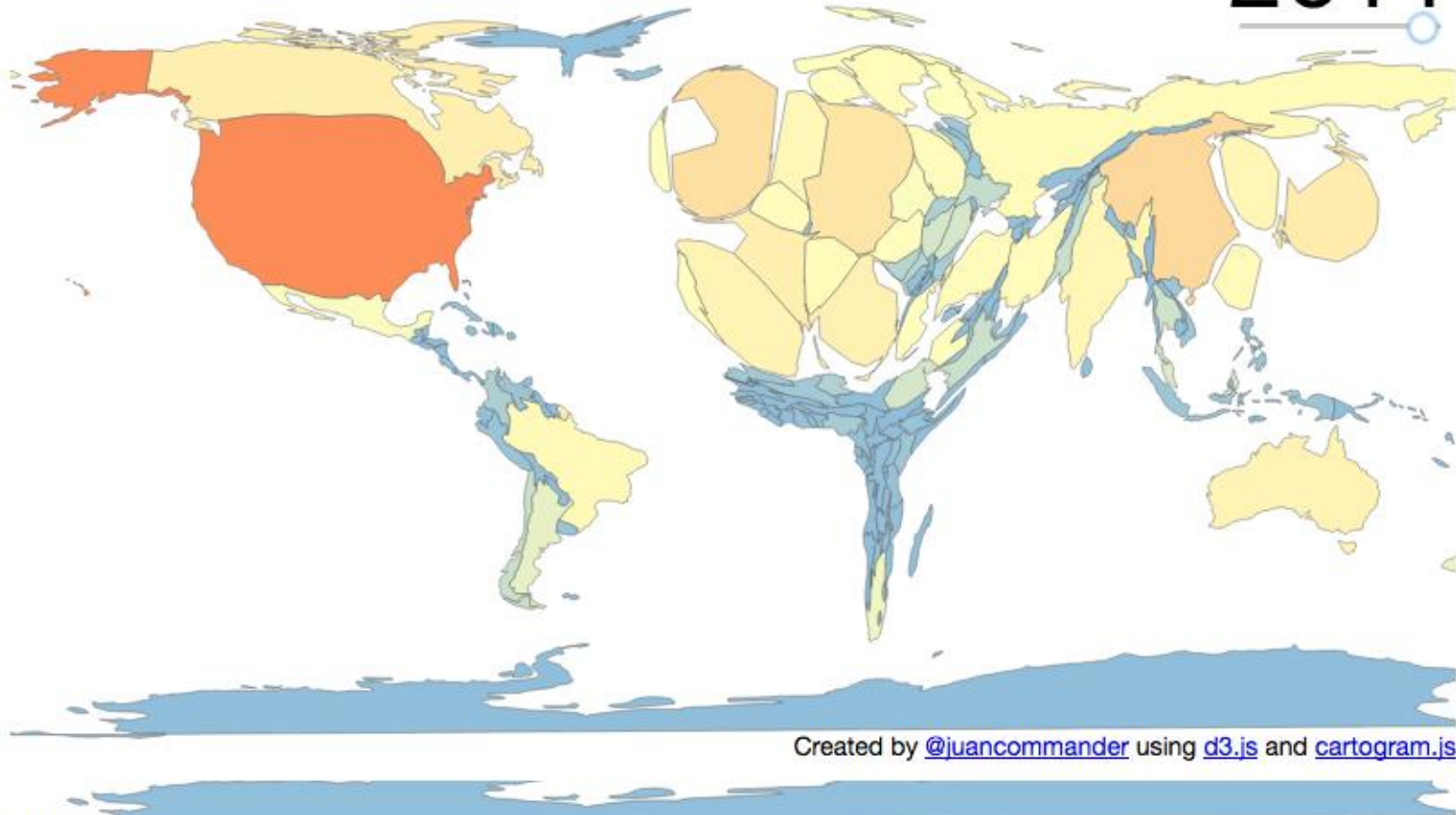
Pero no es sólo problema de acceso ...



El problema de participación

World scaled by number of documents in Web of Science by Authors Living There

2011



About

Juan Pablo Alperin: <http://jalperin.github.io/d3-cartogram/>



Leslie Chan

“Openness is not simply about gaining access to knowledge, but about the right to participate in the knowledge production process, driven by issues that are of local relevance, rather than research agendas set elsewhere or from the top down”

La apertura no se limita a acceder al conocimiento, sino al derecho a participar en el proceso de producción del conocimiento, impulsado por cuestiones de relevancia local...

Somos cómplices!



10 simple strategies to increase the impact factor of your publication

by sven | Mar 5, 2015 | |

Impact factors are heavily criticized as measures of scientific quality. However, they still dominate every discussion about scientific excellence. They are still used to select candidates for positions as PhD student, postdoc and academic staff, to promote professors and to select grant proposals for funding. As a consequence, researchers tend to adapt their publication strategy to avoid negative impact on their careers. Until alternative methods to measure excellence are established, young researchers have to learn the “rules of the game”.



El factor de impacto de la revista y otros indicadores de los editores son la base de nuestro sistema de prestigio académico y evaluación

Peer review and scientific publishing

Nobel winner declares boycott of top science journals

Randy Schekman says his lab will no longer send papers to Nature, Cell and Science as they distort scientific process

Ian Sample, science correspondent

[@iansample](#)

Monday 9 December 2013 19.42 GMT



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“The pressure to publish in "luxury" journals encouraged researchers to cut corners and pursue trendy fields of science instead of doing more important work.” (Dr. Randy Schekman)

"La presión para publicar en revistas de "prestigio" incentiva a los investigadores de cortar esquinas y llevar a cabo los temas de la ciencia de moda en lugar de hacer el trabajo más importante."



Fernando Carrión, FLACSO

“La academia revistera” 12/Abril/2014

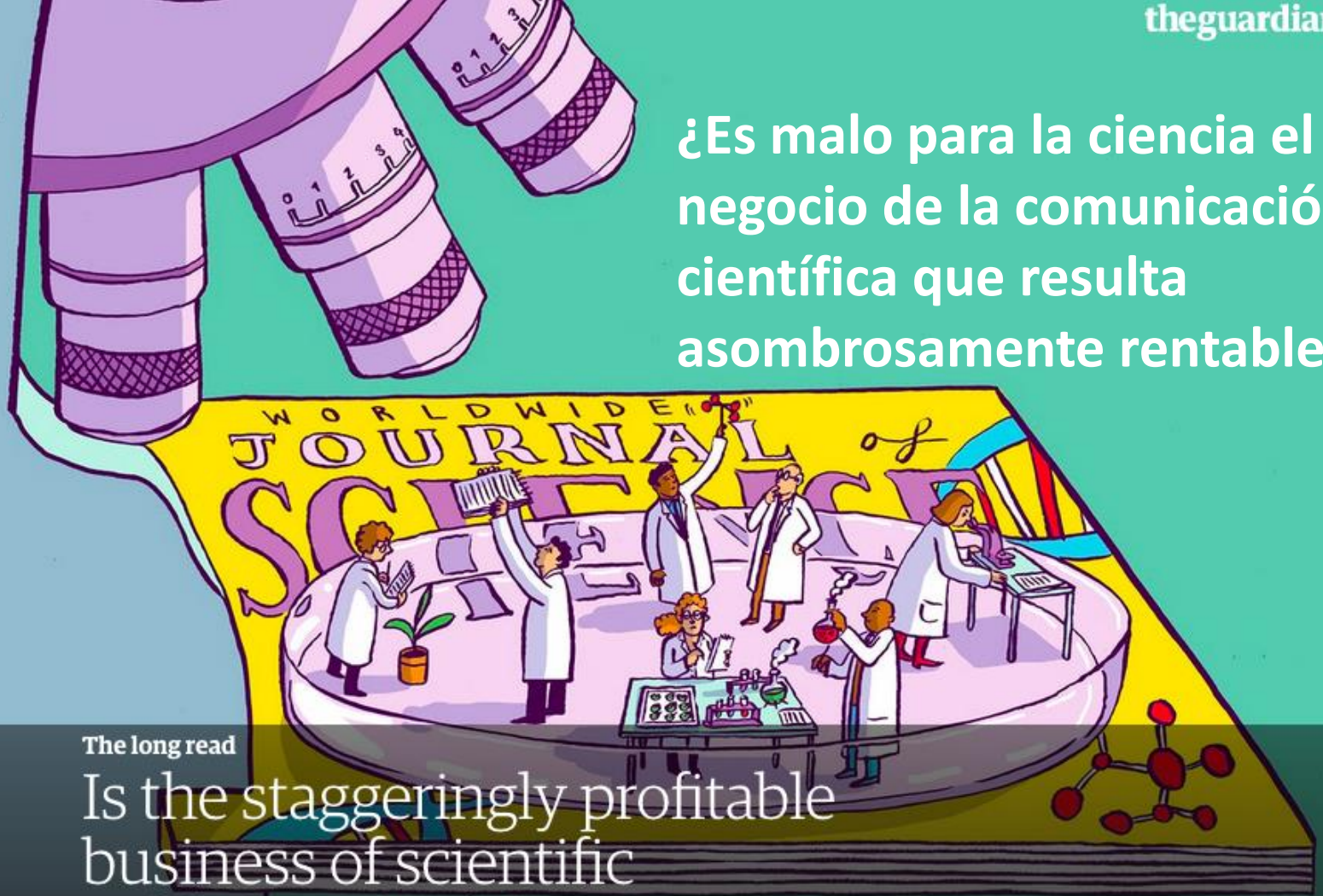
“Hoy la academia ecuatoriana intenta caminar bajo una cultura “revistera” que muy poco impacto tendrá en el conocimiento de nuestra realidad y, en cambio, si tendrá uno muy alto en la construcción de una academia destinada a satisfacer mercados externos y a los egos personales.”

¿Es malo para la ciencia el negocio de la comunicación científica que resulta asombrosamente rentable?

The long read

Is the staggeringly profitable business of scientific publishing bad for science?

SI!



Los cinco editores más prolíficos representan más del 50% de todos los artículos publicados en 2013.

 OPEN ACCESS  PEER-REVIEWED
RESEARCH ARTICLE

The Oligopoly of Academic Publishers in the Digital Era

Vincent Larivière , Stefanie Haustein, Philippe Mongeon

Published: June 10, 2015 • DOI: 10.1371/journal.pone.0127502

Article	Authors	Metrics	Comments	Related Content
				

Abstract

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[Methods](#)

[Results](#)

[Discussion and](#)

[Conclusion](#)

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[Media Coverage \(7\)](#)

Abstract

The consolidation of the scientific publishing industry has been the topic of much debate within and outside the scientific community, especially in relation to major publishers' high profit margins. However, the share of scientific output published in the journals of these major publishers, as well as its evolution over time and across various disciplines, has not yet been analyzed. This paper provides such analysis, based on 45 million documents indexed in the Web of Science over the period 1973-2013. It shows that in both natural and medical sciences (NMS) and social sciences and humanities (SSH), Reed-Elsevier, Wiley-Blackwell, Springer, and Taylor & Francis increased their share of the published output, especially since the advent of the digital era (mid-1990s). Combined, the top five most prolific publishers account for more than 50% of all papers published in 2013. Disciplines of the social sciences have the highest level of concentration (70% of papers from the top five publishers), while the humanities have remained relatively independent (20% from top five publishers). NMS disciplines are in



Timothy Gowers “los incentivos perversos”



REVIEW ARTICLE

How to publish a scientific manuscript in a high-impact journal

Emad M. El-Omar*



10 simple strategies to increase the impact factor of your publication

by sven | Mar 5, 2015 | |

Impact factors are heavily criticized as measures of scientific quality. However, they still dominate every discussion about scientific excellence. They are still used to select candidates for positions as PhD student, postdoc and academic staff, to promote professors and to select grant proposals for funding. As a consequence, researchers tend to adapt their publication strategy to avoid negative impact on their careers. Until alternative methods to measure excellence are established, young researchers have to learn the “rules of the game”.



El acceso abierto ha llegado!



Acceso abierto

- Parte de una tendencia mas grande para apertura y transparencia de ciencia en general - “open science”
- Ahora, la cuestión no es *si* debemos tener acceso abierto, pero *¿cómo* se implementar acceso abierto



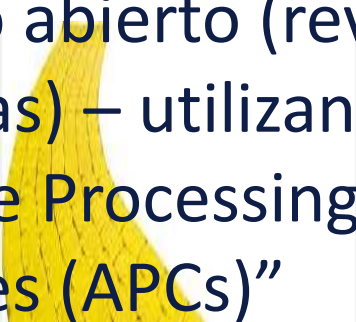
Transición fácil?



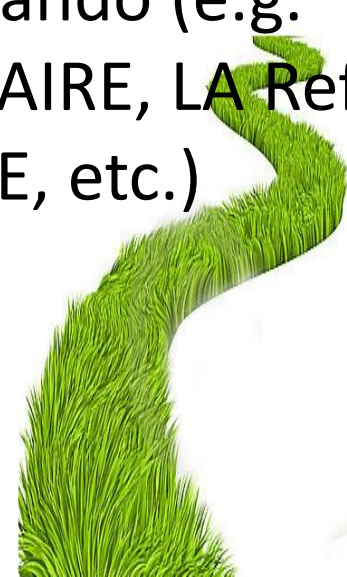
Photo credit: Roy Gumble (www.allposters.com)

Dos “caminos” para acceso abierto

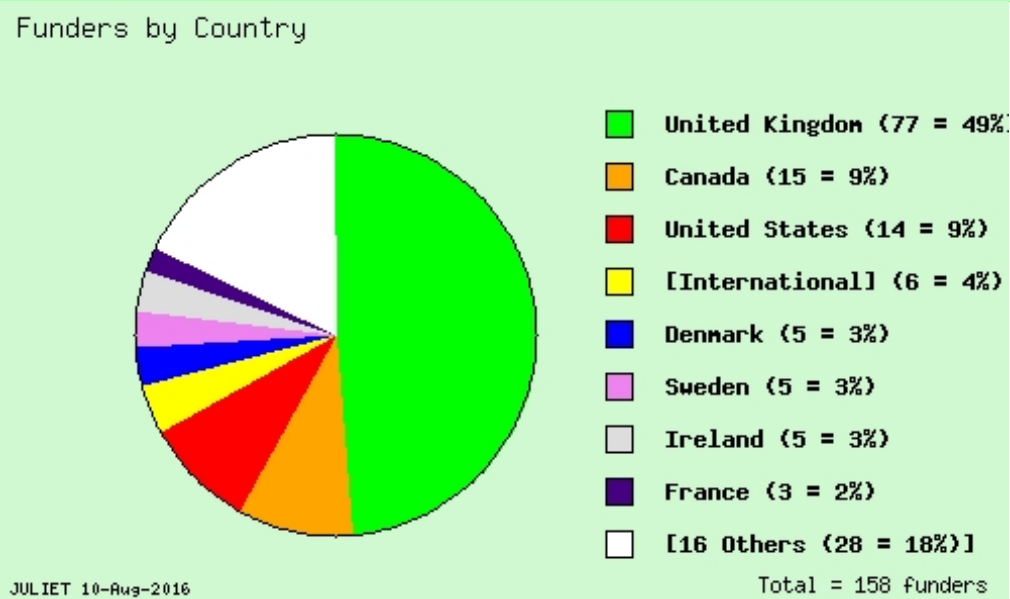
Revistas en Acceso Abierto

- Revistas sin suscripciones
 - Una variedad de modelos de negocio
 - Las “grandes editoriales” ofrecen una opción acceso abierto (revistas híbridas) – utilizando “Article Processing Charges (APCs)”
- 
- A yellow path with a textured, woven appearance, starting from the bottom left and curving upwards towards the right, symbolizing the path to open access journals.

Repositorios Acceso Abierto

- Más de 3000 repositorios alrededor del mundo
 - Redes de repositorios nacionales y regionales están desarrollando y ampliando (e.g. OpenAIRE, LA Referencia, SHARE, etc.)
- 
- A green path with a grassy texture, starting from the bottom right and curving upwards towards the left, symbolizing the path to open access repositories.

Políticas internacionales son verdes



Criterion (Green OA)	Number of policies	Criterion (Gold OA)	Number of policies
Deposit in repository required (Green OA)	381	OA publishing required	2
Deposit in repository requested	140	Recommended alternative to Green OA	97
Deposit in repository not specified	141	Permitted alternative to Green OA	101
		Not specified/other	463
Total	663		663

Table 3: Open Access policies: Green and Gold OA criteria

Unión Europea: May. 27, 2016



The Competitiveness Council meeting in Brussels this week.

EU Competitiveness Council

In dramatic statement, European leaders call for 'immediate' open access to all scientific papers by 2020

La solución de los editoriales internacionales: APCs (Article Processing Charges)

ELSEVIER

Open access publication fee

A fee is payable by the author, or their institution or funder to cover the publication costs. Fees range from \$500 to \$5,000 US Dollars. Visit your journal's home-pages for specific pricing information.

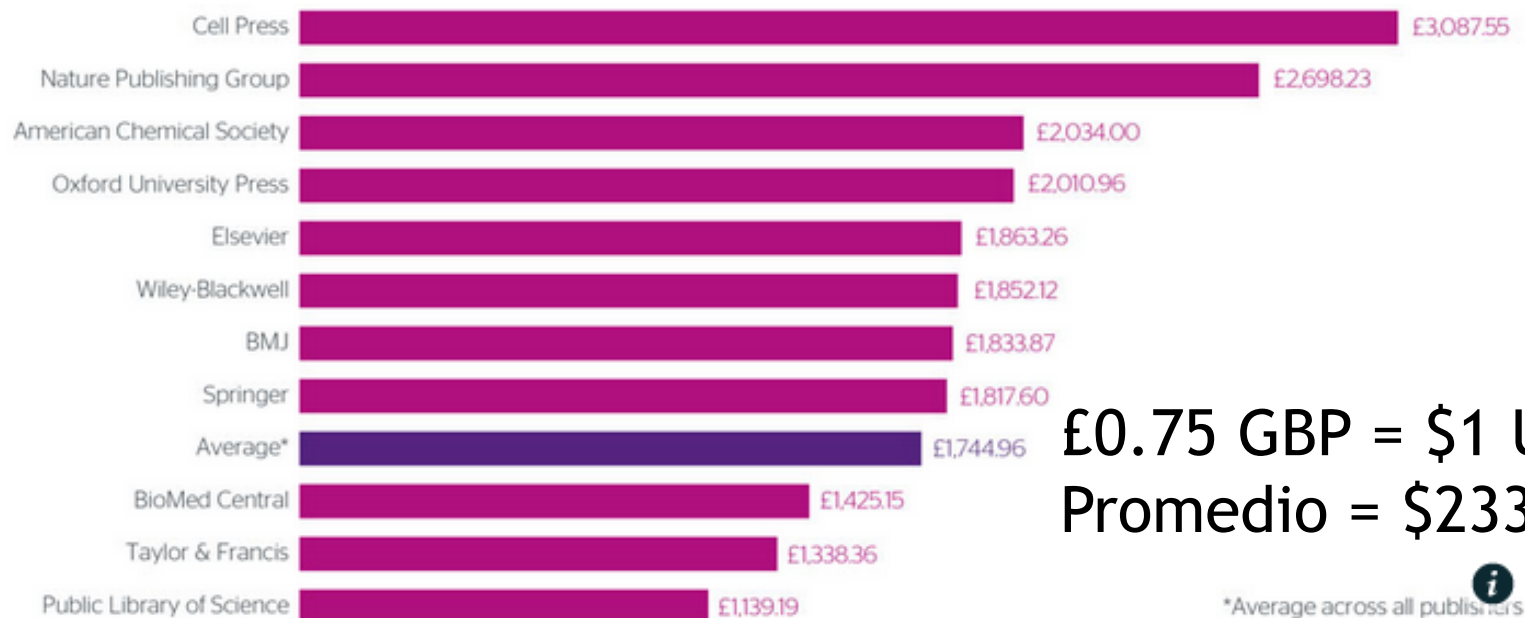
Open Choice: Your research. Your choice.

Open Choice allows you to publish open access in the majority of Springer's subscription-based journals.



Sostenible? El precio para publicar en acceso abierto en las revistas internacionales

The initial wide variety in APC prices and their general convergence shows that APC prices are not grounded in the actual cost of producing an article but rather are reflections of what the market can bear (Lawson, "APC Pricing", 2014). The report's estimate of £1,500-£2,000 may have encouraged cheaper journals to raise prices in order to be seen as high quality.



£0.75 GBP = \$1 US
Promedio = \$2334.58 US

Figure 9: Average APC

“Article processing charges (APCs) and subscriptions. Monitoring open access costs”, Jisc. United Kingdom. Junio 2016 <https://www.jisc.ac.uk/reports/apcs-and-subscriptions>

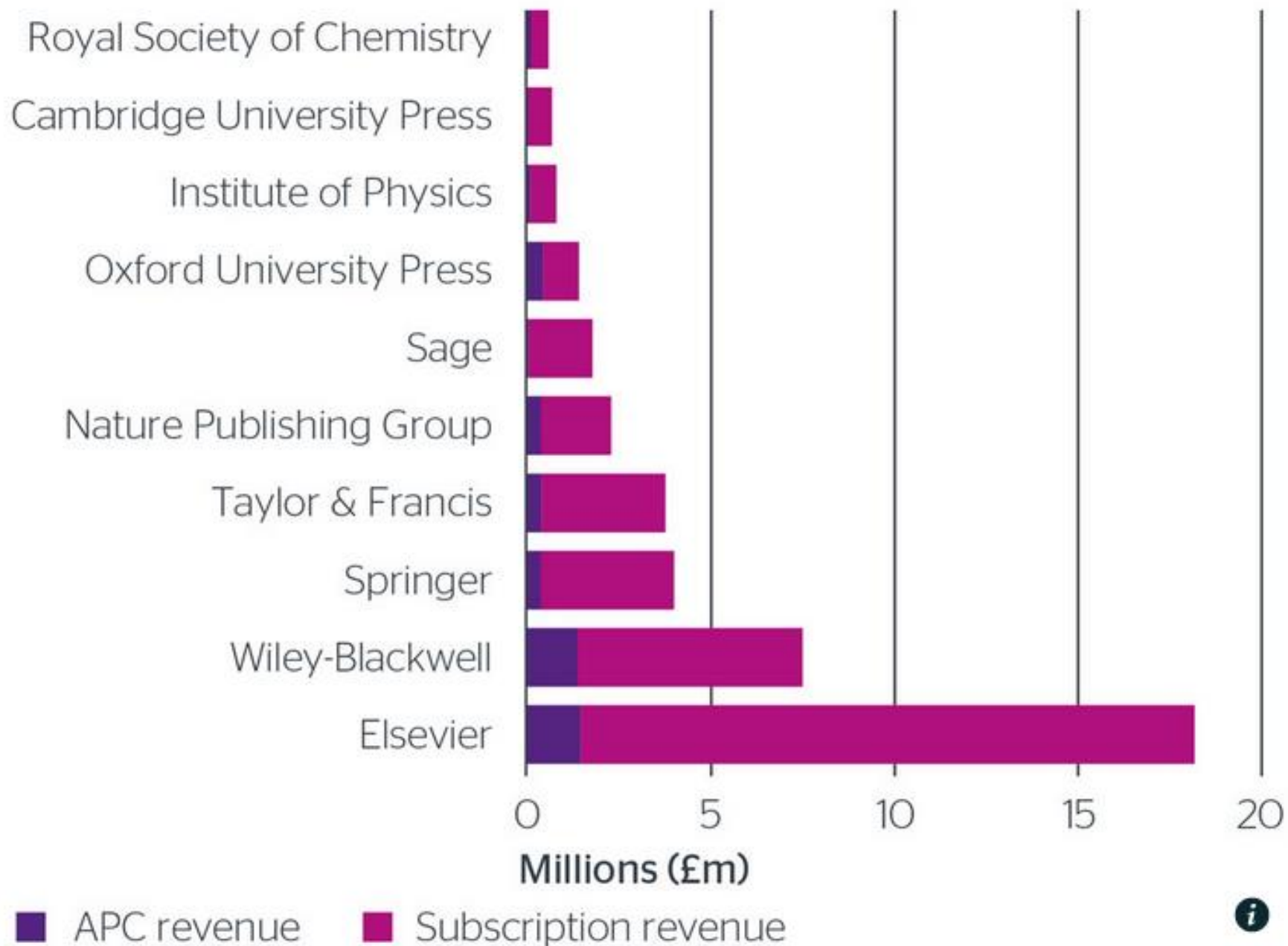


Figure 22: APC and subscription revenue by publisher, 2014

“The flip” (la vuelta?)



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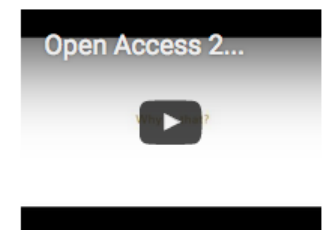
About OA2020

OA2020 is an initiative building on the [Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities](#), which has been embraced by more than 560 [signatory institutions](#). Building on the [Mission Statement](#) of 2013, OA2020 aims to accelerate the transition to open access by transforming the existing corpus of scientific journals from their current subscription system to open access. A key reference is the [Expression of Interest](#) – a document that was discussed and adopted at the [Berlin 12 conference](#), held on 8-9 December 2015.

Over the course of the last 10-15 years, open access has become a shared vision of many if not most of the world's national and international research councils. Open access as a principle is very well-established in the international discourse on research policies; however, open access as a practice has yet to transform the traditional subscription-based publishing system, which is as vigorous and prosperous as ever, despite its inherent restrictions on access and usage and its remarkable detachment from the potentials of a 21st century web-based publishing system.

OA2020 – initiative for
the large-scale transition
to open access

INTRO VIDEO





Declaración conjunta COAR-UNESCO sobre Acceso Abierto

El acceso abierto es una tendencia global, con políticas y prácticas que están siendo rápidamente adoptadas en todo el mundo. A medida que el mundo ingresa en una nueva era de desarrollo sostenible, la apertura e inclusión en los procesos de la investigación científica serán cada vez más críticos. Aunque la mayoría de los gobiernos están de acuerdo con los principios fundamentales del acceso abierto, hay una diversidad significativa en la forma en que los países han abordado su implementación. Estas diferencias reflejan una variedad de perspectivas, valores y prioridades de las diferentes regiones. Es evidente que no existe una solución única que sirva para todos en la implementación del acceso abierto.



DECLARACIÓN PRIMERA REUNIÓN DE CONSORCIOS DE IBEROAMÉRICA Y EL CARIBE

Ciudad Juárez, México
31 de agosto y 1 de septiembre 2017

Acordamos que una política de expansión del AA, mediante el pago de tarifas APC, es imposible acometerla desde un punto de vista financiero para los países participantes; se recomienda a las instituciones no crear subsidios para pagar publicación en revistas OA-APC.

La pregunta!

¿Qué valor (realmente) aportan las organizaciones comerciales a nuestro sistema de producción y difusión científica?



Elsevier adquiere “bepress”, un proveedor de servicios utilizado por las instituciones académicas para mostrar su investigación

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Elsevier acquires bepress, a leading service provider used by academic institutions to showcase their research

Bepress to benefit from Elsevier's technology and analytics to expand offerings to more institutions, while helping Elsevier drive further adoption of its research data management tools

Share this:

New York, August 2, 2017

Elsevier, the global information analytics business specializing in science and health, today acquired [bepress](#) [↗], a Berkeley, California-based business that helps academic libraries showcase and share their institutions' research for maximum impact. Founded by three University of California, Berkeley professors in 1999, bepress allows institutions to collect, organize, preserve and disseminate their intellectual output, including preprints, working papers, journals or specific articles, dissertations, theses, conference proceedings and a wide variety of other data.

Tal vez es el momento de...

Devolver el control del sistema de comunicación científica a la comunidad investigadora y académica!



De esta manera...nuestra visión

- Fortalecer y ampliar el papel de la institución en la comunicación científica
- Para COAR, los repositorios son herramientas importantes para actualizar esta visión





OBJETIVOS DE DESARROLLO SOSTENIBLE

17 OBJETIVOS PARA TRANSFORMAR NUESTRO MUNDO

#9: infraestructura local que sea sostenible e inclusiva

(Los sistemas abiertos, distribuidos, como el Internet, son más flexibles, sostenibles y menos propensos a fallar, o ser comprada por las empresas comerciales)

Futuro de las Bibliotecas, Oct 2016: Massachusetts Institute of Technology

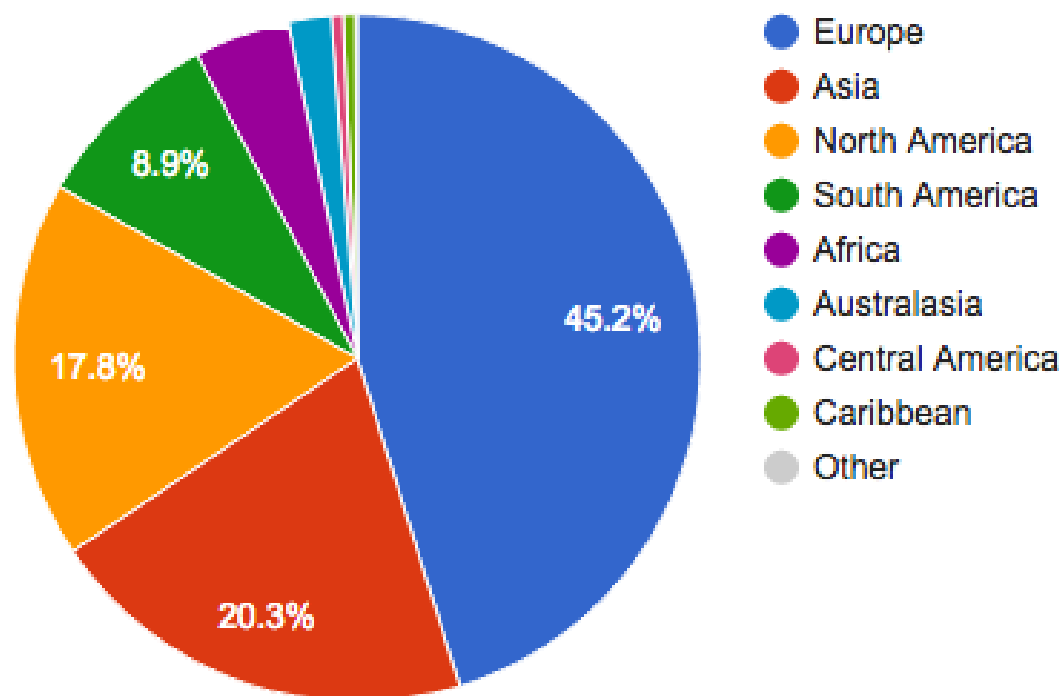


“... The MIT Libraries must operate as an **open, trusted, durable, interdisciplinary, interoperable content platform** that provides a foundation for the entire life cycle of information for collaborative global research and education.”

En este informe, describimos una nueva visión, audaz, para la biblioteca como una plataforma global, abierta arraigada en nuestros valores y misión compartidos

La situación actual de los repositorios

Proportion of Repositories by Continent - Worldwide



Total = 3448 repositories

OpenDOAR - 02-Oct-2017

Pero, en su forma actual, los repositorios sólo perpetúan el sistema defectuoso



"I'm right there in the room, and no one even acknowledges me."



"What if we don't change at all ... and something magical just happens?"

Nuestra visión para el futuro

Posicionar los **repositorios** (y sus instituciones) como la **base** para una **infraestructura** de comunicación académica y científica distribuida y globalmente interconectada

Nueva generación de repositorios!

Next generation repositories!

Grupo de Trabajo



Eloy Rodrigues, chair (COAR, Portugal)
Andrea Bollini (CINECA, Italy)
Alberto Cabezas (LA Referencia, Chile)
Donatella Castelli (OpenAIRE/CNR, Italy)
Les Carr (Southampton University, UK)
Leslie Chan (University of Toronto at Scarborough, Canada)
Rick Johnson (SHARE/University of Notre Dame, US)
Paolo Manghi (CNR, Italy)
Lazarus Matizirofa (NRF, South Africa)
Petr Knoth (Open University and Jisc, UK)
Pandelis Perakakis (Open Scholar, Spain)
Jochen Schirrwagen (University of Bielefeld, Germany)
Daisy Selematsela (NRF, South Africa)
Kathleen Shearer (COAR, Canada)
Tim Smith (CERN, Switzerland)
Herbert Van de Sompel (Los Alamos National Laboratory, US)
Paul Walk (EDINA, UK)
David Wilcox (Duraspace/Fedora, Canada)
Kazu Yamaji (National Institute of Informatics, Japan)



Dos ideas central para actualizar nuestra vision

1. Mejorar la funcionalidad de los repositorios:

- Ser de, y no solamente estar en, La Web
- Interoperabilidad global
- Repositorios pro-activos

Dos ideas central para actualizar nuestra vision

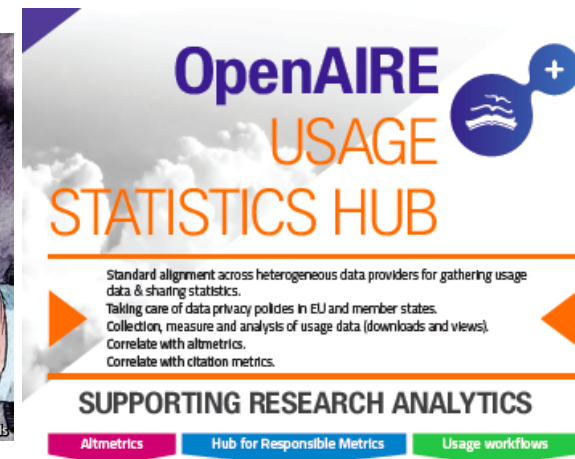
2. Suportar el desarrollo de servicios de valor agregado



Recommender systems

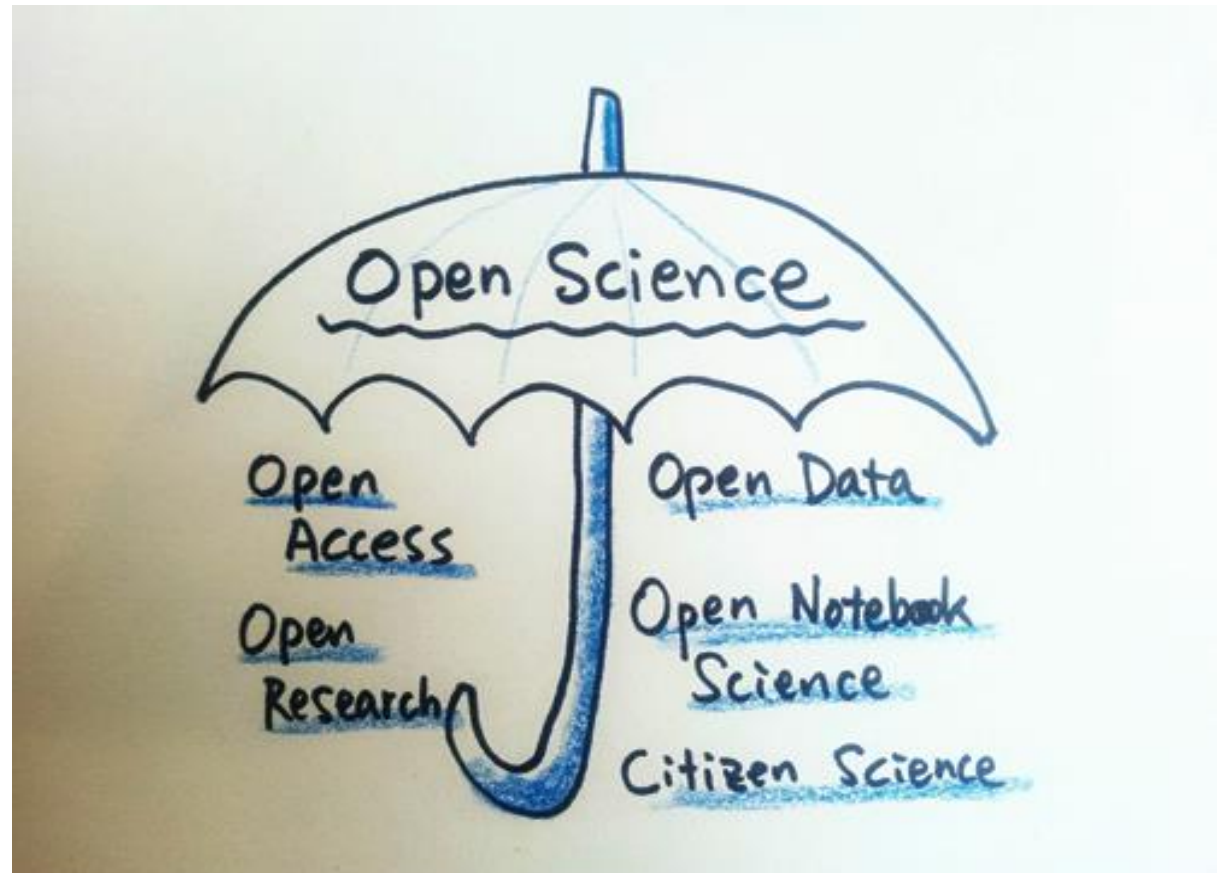


Open peer review



Nuestra visión incluso mas que artículos

Todos los
productos de
la ciencia
deben ser
compartidos



Nueva generación de repositorios



El problema:

Los repositorios aún no realizaran todo su potencial y funcionan principalmente como recipientes pasivos y aislados de las versiones finales de los resultados de investigación publicados

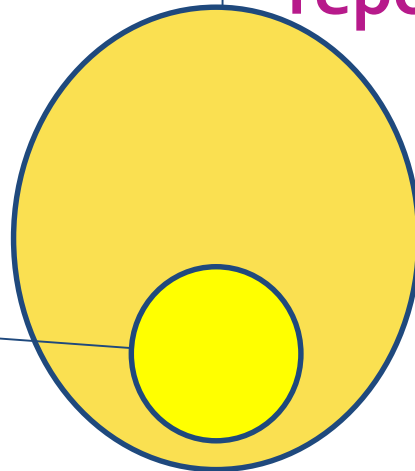
Los repositorios siguen usando tecnologías y protocolos diseñados 20 años atrás, antes del boom de la Web, de Google, web semántica, redes sociales y dispositivos móviles ubicuos

repositorios actuales

Nueva generación de repositorios

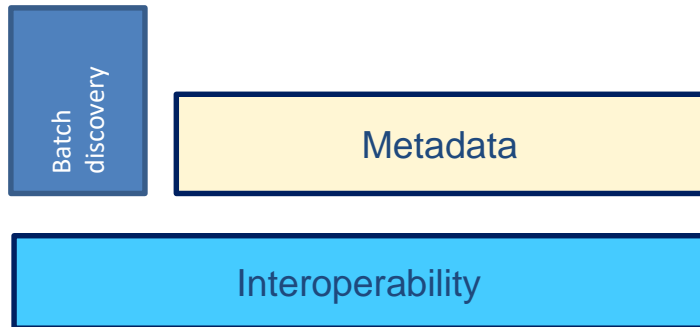
Services we can develop with repositories today

Services we can develop with the next generation of repositories

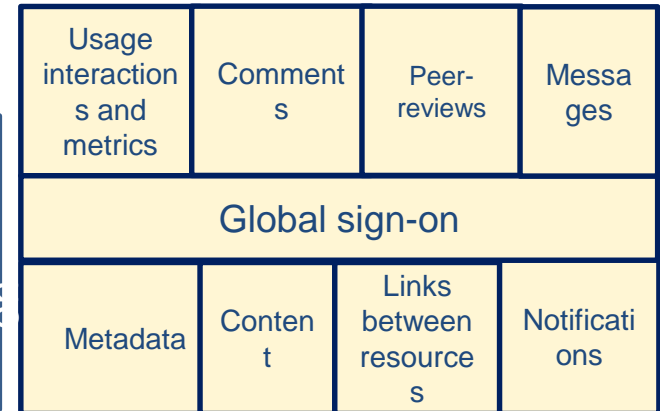


Conceptual layer

Conceptual layer



Persistence layer



Persistence layer



Metodología

1. Identificar los principales casos de uso
2. Determinar funcionalidades / comportamientos
3. Desarrollar modelos conceptuales
4. Definir tecnologías y arquitecturas
5. Publicar recomendaciones
6. Apoyar la adopción e implementación

Resultados iniciales

12 historias de usuario disponibles para comentarios del público del 7 de febrero al 3 de marzo de 2017

- . Más de 60 comentarios recibidos
- . Recomendaciones técnicas que se están desarrollando en base a las historias de usuarios

Casos de uso y prioridades

Discovery and exposing resources	Batch	<ul style="list-style-type: none">• Data mining• Discovering metadata that describe a scholarly resource• Discovering the identifier of a scholarly resource• Discovering usage rights• Resource syncing and notification
	Navigation	
	Notification	
Research workflows and lifecycle	Annotation	<ul style="list-style-type: none">• Recognizing the user• Commenting & annotating• Providing a social notification feed• Recommender systems for repositories• Preservation
	Commenting	
	Social interaction	
Research evaluation	Peer review	<ul style="list-style-type: none">• Peer-review• Comparing usage
	Metrics	

Example of recommendations

Discovery and exposing resources	Batch	<ul style="list-style-type: none">• Adopt ResourceSync• Hold OAI-PMH
	Navigation	<ul style="list-style-type: none">• Adopt Signposting
	Notification	<ul style="list-style-type: none">• Adopt Message Queue

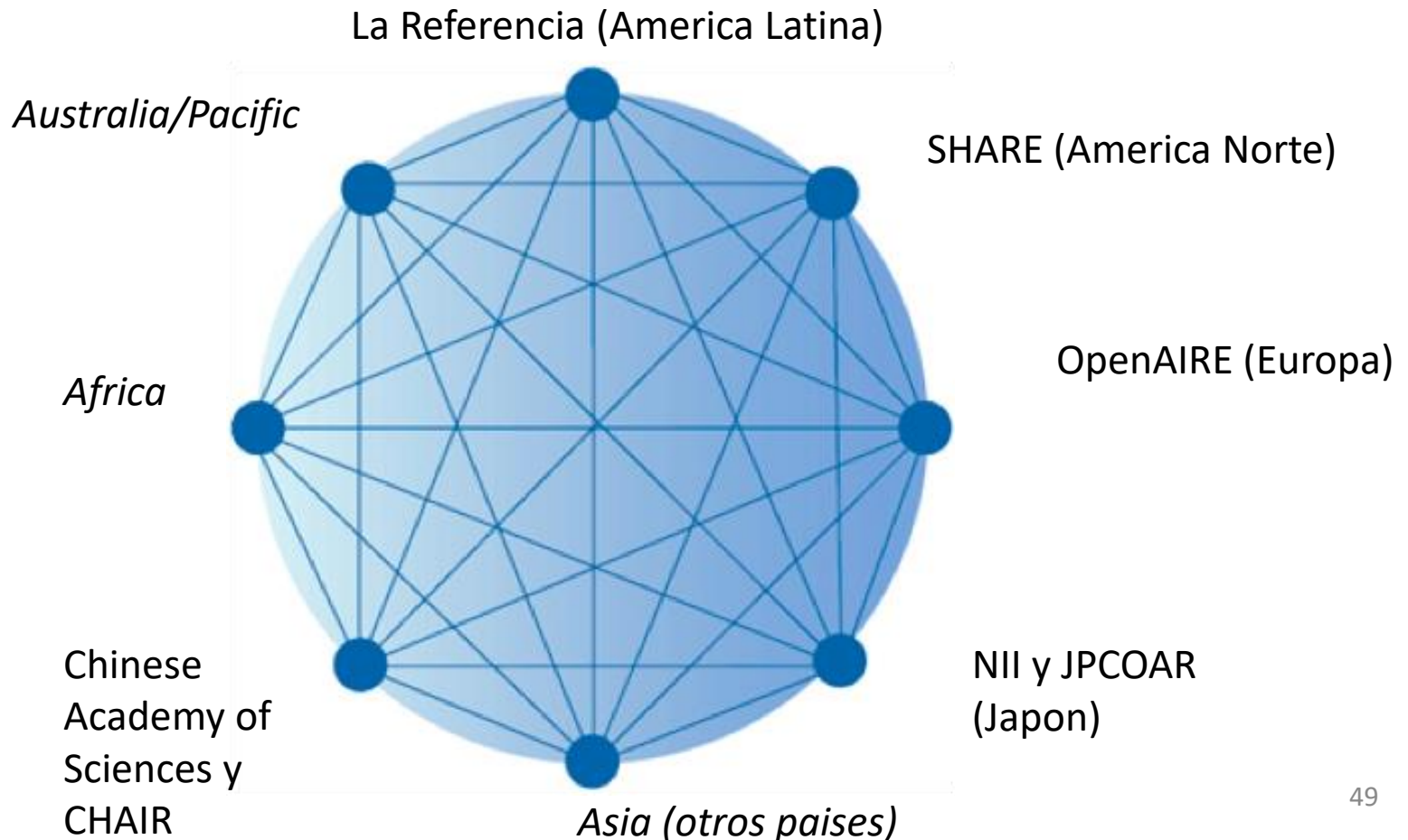
Nueva Generación de Repositorios (NGR)

Próximos pasos

1. Publicar recomendaciones tecnológicas (noviembre 2017)
2. Desarrollar una estrategia para la implementación de la visión de la NGR (4 comunidades)
 1. Redes de repositorios
 2. Plataformas de repositorios
 3. Instituciones y bibliotecas
 4. La comunidad académica en general

La estrategia para implementación de NGR

- Trabajar con los redes regionales y nacionales



Home » News & Publications » International Accord strengthens ties between repository networks worldwide

Statements,
Guidelines, Reports



Save the date ! COAR2018
Annual Meeting

Dissemination Material

News and Links

« Survey about the value and benefits of COAR

Summary of COAR Annual Meeting »

International Accord strengthens ties between repository networks worldwide



Australasia, Canada, China, Europe, Japan, Latin America, South Africa, United States

La estrategia para implementación de NGR

- Trabajar con las plataformas



La estrategia para implementación de NGR

- Trabajar con las bibliotecas y instituciones



La estrategia para implementación de NGR

- Otros comunidades
 - Comunicación y “branding” de nuestro visión
 - Pilotos

Queremos trabajar con ustedes!

SI QUIERES IR RAPIDO, VETE
SOLO, PERO SI QUIERES
LLEGAR LEJOS, TRABAJA EN
EQUIPO



Gracias!
Kathleen Shearer y Eloy Rodrigues